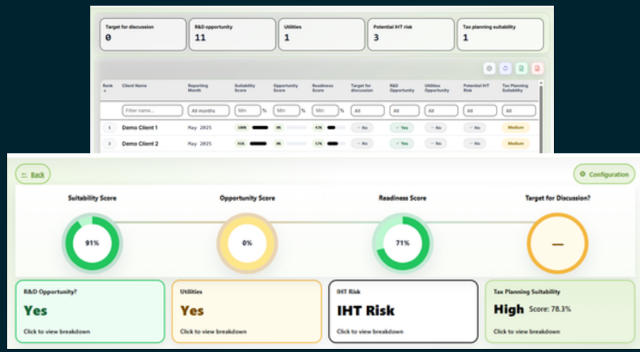
virtual finance director

CORE Insights | Portfolio Review



10 Questions to Ask After Running a CORE Insights Portfolio Review

Use these questions to turn your insights into meaningful conversations and identify where opportunities exist across your client portfolio.

1. **Which clients surprised me the most – positively or negatively?**
Look beyond assumptions. The data may reveal opportunities or risks you hadn't expected.

2. **Which clients should I contact first, and why?**
Prioritise based on opportunity size, risk level, or readiness for change.

3. **Where are the biggest opportunities in my portfolio?**
Consider growth potential, profitability improvement, pricing, or advisory needs.

4. **Which clients may need support or intervention?**
Identify businesses showing signs of financial stress or declining performance.

5. **Who is ready for a more proactive conversation?**
Look for clients showing positive momentum or clear growth ambitions.

6. **What trends am I seeing across my client base?**
Are there common challenges or opportunities emerging across sectors or business models?

7. **Where could I add more value than anyone else?**
Consider your expertise, experience and the gaps in your current service offering.

8. **What conversations am I not currently having?**
Are there topics that would benefit the client but rarely get discussed?

9. **Which clients would benefit most from a Performance Review?**
Use insights and the Business Overview Report to identify ideal candidates.

10. **What actions will I take in the next 30 days?**
Turn insight into action. Decide who you'll speak to and what you'll discuss.

"Insight is only valuable when it leads to action."

Use CORE Insights to start more meaningful conversations, deliver greater impact and grow your practice.

Learn more about CORE Insights and our advisory programmes at

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